

FOOD SERVICE SPECIALIST SECOND CLASS COURSE

PROCUREMENT

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QUESTIONS ABOUT THIS TEXT SHOULD BE
ADDRESSED TO THE SUBJECT MATTER SPECIALIST FOR THE
FOOD SERVICE SPECIALIST RATING

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Notice to Students

Introduction This course book is designed to introduce you to Routine Coast Guard procurement transactions.

Objectives After completing this course book you'll be able to:

- Prepare a Procurement Request
- Prepare a Request for Quotations
- Prepare an Amendment of Solicitation/ Modification of Contract (SF-30).
- Construct a basic Acquisition Instrument Identification # (AIIN)
- Construct and interpret DAFIS document #'s and prepare accounting strings

In addition you'll be able to execute a small purchase procurement using the following small purchase procurement methods.

- Purchase Orders (CG-5398, OF-347, SF-44)
- Imprest Funds (SF-1165)
- Government wide Commercial Credit Cards
- Blanket Purchase Agreement (CG-5398, OF-347, OF-348)

Continue on next page

Notice to Students, Continued

References

To complete this course book you'll need the following manuals:

- Small Purchase Handbook (M 4200. Series)
- LUFS User Manual
- USCG Finance Center Standard Operating (FINCENSTINST M7000.SERIES)
- Coast Guard Acquisition Procedures(CGAP) (COMDINST M4200.series)
- Certifying and Disbursing Manual (COMDINST M7210.series)

Forms

You'll need the following forms to complete this course book:

- Request for Quotations (SF-18)
 - Amendment of Solicitation/Modification of Contract (SF-30)
 - Order of supplies or services(CG-5398, OF-347)
 - Receipt for Cash Subvoucher (SF-1165)
 - Procurement Request (DOT F 4200.series)
 - Order for supplies or Services Schedule Continuation Sheet (OF-348)
 - Purchase Order-Invoice-Voucher (SF-44)
-

Notice to Students, Continued

READING ASSIGNMENT

Before you begin this course book, you should expose yourself to basic procurement rules and regulations. **YOU Must Read** Chapters 1-5 of the SMALL Purchase Handbook before beginning:

You will be called upon to refer back to these references throughout the course.

Learning Advice

This course book is designed to walk you through each section. Don't skip around ! Follow the instructions and you shouldn't have any problems. If you discover any problems, consult your supervisor for clarification. Or call the Food Service course writer. (707-765-7142)

Important Note

This text has been compiled for **Training Only**. It should **Not** be used in place of official directives or publications. You should, however remember that it's your responsibility to keep up with the latest professional information available for your rating. The current information for individual qualifications are listed in the Enlisted Qualifications Manual, COMDTINST M 1414.8(series).

Practice Exercises

You will be given a practice exercise for preparing cycle menus & load guides. Prior to starting each exercise, you should contact your supervisor and research standardized Coast Guard requirements. Clearly understanding the requirements will prevent you from becoming discouraged.

continued on the next page

Notice to Students, Continued

End Of Course Tests

If properly used, the practical exercises included in this course will assist you for preparing for your EOCT. You must understand and comprehend all of the material to pass your the EOCT. You must achieve a score of 80% or better to successfully complete this course. Taking time to review this material prior to the EOCT is advisable.

Service Wide Exam Study

Servicewide examination questions for your pay grade and rating are base on the Professional and Military Requirements sections of the Enlisted Qualifications Manual, COMDTINST M (1414.8)series. Using the references in this course and reviewing all sections for your rating in the Enlisted Qualifications Manual will help you prepare for the servicewide exam.

PQS Format

This course is a self study Performance Qualification Standard (PQS) style course. It provides pertinent information needed to meet the objectives of each chapter. In addition, it provides a list of references that you can use to obtain additional information about the subject, and that you must use to complete the exercises. The PQS format that helps you to perform the objectives. It combines the performance, skills, and knowledge required for you to qualify for advancement.

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Chapter 1

DAFIS Accounting

**Intro-
duction** DAFIS is an acronym for Departmental Accounting Financial Information System. The Secretary of Transportation mandated that all departmental agencies convert to DAFIS approved accounting on April 1, 1987.

**Standard
Document
Number** Standard document numbers are used to identify and track procurements.

**Reading
Assignment** Read pages 5-1 through 5-4 in the FINCEN SOP.

Note: For this exercise the suffix and sequence numbers are included as part of the DAFIS Accounting Line. However, you CANNOT add these numbers as they are included by the FINCEN.

Practice #1 Using the following scenarios and your reading assignment as a reference, create a standard DAFIS document number. Use fiscal year 95, the program element given, and the document sequence number given:

FS1 Fiori, on board the USCGC NORTHWIND (D-11), is issuing a cash subvoucher to purchase milk. The program element is NW and the document sequence number is 101. Enter the correct standard document number on the line below.

Response: _____

Go to page 4-1 for feedback

DAFIS Accounting, Continued

Practice #1 Continued

- FS2 Rollings, on the USCGC REVENGE (D-7 MLC LANT unit) is preparing a SF-44 to purchase doughnuts from a local vendor. The program element is RV and the document sequence number is 718.. Enter the correct standard document number on the line below.
-

- FSC Ith of Group Mobile (a D-8 unit) is preparing a purchase order to purchase produce. The program element is GM and the document sequence number is 912. Enter the correct standard document number on the line below.
-

- FSCMcGraw of Base Honolulu (a D-14 unit) wants to set up a blanket purchase order with the local vendor. The program element is BH and the document sequence number is 011. Enter the correct standard document number on the line below.
-

DAFIS Accounting, Continued

DAFIS Nonstandard Document Number

There are times when the DAFIS standard document number format is inadequate to document a financial transaction. In cases like this, the DAFIS nonstandard document number format is used.

References

Listed below are financial transactions which require nonstandard document numbering, along with the reference in the FINCEN SOP.

<u>Transaction Type</u>	<u>Page #</u>
• Government wide Commercial Credit Card	12D-99
• Express Mail/Air Freight	12D-111
• GSA Customer Service	12E-25
• MILSTRIP	12E-1

For MILSTRIP you must also read the Supply Policy and Procedures Manual Part II chapter 5

Practice #2

Create nonstandard document numbers using the references listed above and the scenarios listed on the following page.

Continued on next page

DAFIS Accounting, Continued

Practice #2 continued

- Today is August 31, 1995. FS2 Gonzales ordered subsistence supplies with a government VISA card. The vendor is shipping the items today. The VISA card number is 3762928343. The bank's transaction sequence number is 1221*. Write the nonstandard document number for the above transaction on the blank line below.

*added by FINCEN in DAFIS

- Today is March 4 1995. FSCS Peters shipped a DFOS using Federal Express. The carrier's airbill number is R927523845, the suffix is 112*. Write the nonstandard document number for the above transaction on the blank line below.

Write the correct DAFIS nonstandard document number for MILSTRIP document number Z2076458930123, on the blank line below.

Continued on next page

DAFIS Accounting, Continued

Practice #2 Write the correct DAFIS nonstandard document number for the
continued below listed GSA customer service order scenario.

Julian Date: 275

OPFAC: 15222

Ticket #: 98654098

Go to pages 4-2 for feedback

DAFIS Accounting, Continued

AIIN The Acquisition Instrument Identification Number (AIIN) is used to identify a commercial procurement document. Commercial vendors will reference this number on their invoices for payment of supplies of services rendered to the Coast Guard.

Reference Read CGAP page 4-1 through 4-3, (part 1204.602) in the Coast Guard Acquisition Procedures Manual (COMDTINST M4200.19D). You should also refer to page 5-1 through 5-4 in the FINCEN SOP concerning the standard document number crosswalk.

Continued on next page

DAFIS Accounting, Continued

Practice #3 Create AIIN numbers using your references and the below listed document numbers and document types:

21 95 49 5 3TR043 BPA Supply Fund 82

AIIN Number

Response: _____

21 95 27 5 CGR112 Purchase Order UNICOR

AIIN Number

Response: _____

21 95 27 5 LY3235 Delivery Order

AIIN Number

Response: _____

21 95 30 5 RSC098 Agreement _____

AIIN Number

Response: _____

Go to page 4-3 for feedback

Practice #4 Create an AIIN for each scenario below. Use the FINCEN SOP and CGAP as references.

- The year is 1997. FS2 Perkins is aboard USCGC Point Doran (a D-13 unit) and issues a Purchase Order for program element PD, using document sequence number 404.

Response:_____

- The year is 1996. FSCS Malathion is attached to USCG Support Center Portsmouth (a D-5 unit) and is preparing a delivery order for produce. The program element charged for this transaction is PH, and the document sequence number is 013.

Response:_____

- The year is 1996. FS2 Pearson, attached to the USCGC RELIANCE (a MLC LANT unit), is typing a Request for Training (SF-182) The program element used is RL and the document sequence number is 642.

Response:_____

- The year is 1997. FS1 Prose, attached USCG Base Honolulu (a D-14 unit), is preparing a blanket purchase agreement. The program element is HL, and the document sequence number is 202.

Response:_____

Go to page 4-4 for feedback

DAFIS Accounting, Continued

Accounting Line Each unit in the Coast Guard has a unique accounting line. The accounting line tells what account is going to be charged or credited for a particular transaction. Any document that requires an exchange of funds will have an accounting line.

Reading Assignment Read pages 4-1 & 4-2 in the FINCEN SOP.

Continued on next page

DAFIS Accounting, Continued

Practice #5 Label the fields of the accounting line below.

2/L/XS6/111/82/0/PE/14502/2617

(1) (2) (3) (4) (5) (6) (7) (8) (9)

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Go to page 4-5 for feedback

Chapter 2

Commercial Procurement

Intro- duction

In this section you'll learn to prepare the following forms to complete small purchases:

- Procurement Request (DOT F 2400.series)
 - Order for Supplies or Services (CG-5398, OF 347)
 - Receipt for Cash-Subvoucher (SF-1165)
 - Request for Quotations (SF-18)
 - Amendment of Solicitation/Modification of Contract (SF-30)
-

References

You'll need the following manuals to complete this section:

- Small Purchase Handbook (COMDTINST M4200.series)
 - Coast Guard Acquisition Procedures (COMDTINST M4200.series)
 - USCG Finance Center Standard Operating Procedures (FINCENSTFINST M7000.series)
 - Certifying and Disbursing Manual (COMDTINST M7210.series)
-

- Read pages 12D-11 through 12D-14 in the Finance Center Standard Operating Procedures.
- You must have read Chapter 5 in the Small Purchase Handbook to continue.

Commercial Procurement, Continued

Procurement Request (DOT F 4200.series) The Procurement Request (PR) is the first step in the procurement process. It's prepared by the person who is requesting small purchase action.

From a PR to a Document Type Remember that all **PR's** originate as a **DOC TYPE 21**. However, **DOC TYPE 21's** will change to the final purchase document type, upon transferring the purchase request.

For example, **DOC TYPE 21** will change to **DOC TYPE :**

- 26 for dining facility documents.
 - 32 for Government wide Commercial Credit Card (I. M. P. A. C.)
 - 33 for meal tickets (DD-652)
-

References You should reference the reverse side of the (PR) and pages 12D-11 through 12D-13 in the FINCEN SOP for form preparation instructions. You may also refer to Chapter 2 of the Small Purchase Handbook for instructions on preparation of the PR.

Commercial Procurement, Continued

Practice #1 Prepare a Purchase Request (PR) using your references and the following scenario. You've been instructed to prepare a procurement request to order Dishwashing supplies. The following information applies.

- Economics Laboratories
2041 Coronado Parkway, Portland, OR 95954
Phone : (808) 764-7834
POC: Bill Walters
- Soil Master Dishwashing Detergent
13 Cases
143.00 per case
Item Number D717634454
- Jet Dry Wetting Agent
8 Cases
\$32.00 per case
Item Number W272643
- Person to contact: FS2 your Name
- Originating office data: Galley X8381
- Procurement request number: 21-95-30
- Program Element CB
- Date Received : 02 June 1995
- This is a new request
- Destination: Officer in Charge (FSO)
U.S. Coast Guard Station
Coos Bay, Oregon 94954
Attn: FS1 Janson

continued on the next page

Commercial Procurement, Continued

Date required: June 15, 1995

- Approving officials: (1) FS1 Janson
(2) BMCM J. Donovan
* both will sign on May 15, 1995
- Accounting Data: **2/S/501/113/30/0/ZZ/30478/2634**
- GSA Contract # GS-OOF-8012 Expiration date: 30 SEP 1999
- FOB: Destination
- Delivery Terms: 30 days ARO
- Payment Terms: Net 30 days

Go to page 4-6 for feedback

Purchase Order Invoice-Voucher (S F-44)	The SF-44 is a form designed for on the spot, over the counter purchases of supplies and non-personal services. The order number should be separated with a dash after the fourth and seventh position, this change improves the readability of the document.
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Reading Assignment	Read Chapter 5 pages 14-15 in the Small Purchase Handbook. You may also refer to pages 12D-14 through 12D-19 in the FINCEN SOP for form preparation instructions.
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Dollar Limitation	<i>Except for purchases made under unusual and compelling urgency, the amount of purchase must not exceed the limitation, as per the Small Purchase Handbook COMDTINST M4200.13 series.</i>
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Continued on next page

Commercial Procurement, Continued

Practice #2

Prepare an SF-44 to purchase the items on PR 26972877RM138 seen below. Date the SF-44 May 14, 1997. SKC J. R. Peeves (contracting officer) will sign the SF-44.

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF 2 PAGES

DEPARTMENT OF TRANSPORTATION										PROCUREMENT REQUEST NO. 26972877RM138			
PROCUREMENT REQUEST PROCESS RAPIDLY										DATE RECEIVED			
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT FS2 Your Name										2. TYPE OF REQUEST (Check one)			
3. ORIGINATING OFFICE DATA GALLEY										A. <input checked="" type="checkbox"/> NEW REQUEST			
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) Jimmies Fish Market 123 Water Street Key West, FL 33040-0005										B. <input type="checkbox"/> CHANGE TO PENDING PR NO.			
										C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO.			
5. APPROVALS										6. CONSIGNEE AND DESTINATION Commanding Officer USCGC Rambler (WLIC 298) c/o CG Base 196 Tradd Street Charleston, SC 29401-1817			
APPROVING OFFICIALS		ROUTING SYMBOL	DATE	INTERNAL ROUTING									
(A)	(B)	(C)	INITIALS (D)	ROUTING SYMBOL									
LTJG P. Craig	OPS	05/11											
Lt E. Greecy	ACO	05/11											
										7. DATE(S) REQUIRED May 14, 1997			
										8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" see par. 8 of instructions on page 2.)			
9. DESCRIPTION OF ITEMS OR SERVICES													
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)							QTY (C)	UNIT (D)	ESTIMATED COST			
										UNIT (E)	AMOUNT (F)		
1.	Swordfish Steaks							10	LB	5.75	57.50		
2.	Prawns							15	LB	5.25	78.75		
10. ACCOUNTING DATA													
SYSTEM DATA				CHECK APPLICABLE QUARTER				TOTAL \$136.25					
				<input type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input checked="" type="checkbox"/> 3RD <input type="checkbox"/> 4TH									
A	D	APPR	UM	APC	A	PROGRAM	COST	OBJECT	DOCUMENT NUMBER			PROJECT	ACCOUNTING AMOUNT
Y	T	CODE	CODE	CODE	L	ELEMENT	CENTER	CLASS	TYPE	FY	P. R. NUMBER		
2	7	XS6	107	82	0	RM	16306	2617	21	97	2877RM138		\$136.25
2					0				21				
2					0				21				

FORM DOT F 4200.1-2CG (REV. 2-84)
PREVIOUS EDITIONS ARE OBSOLETE

Go to page 4-7 for feedback

Commercial Procurement, Continued

Receipt for Cash-Subvoucher (SF-1165) The Receipt for Cash-Subvoucher (SF-1165), or a Purchase-Order-Invoice-Voucher (SF-44), is used to obtain cash from an Agent Cashier to make a cash purchase.

Reading Assignment Read the following manuals for reference material:

- Pages 12D-6 through 12D-10 in the FINCEN SOP
- Chapter 5 page 13 in the Small Purchase Handbook
- Pages 2-49 through 2-51 in the Certifying and Disbursing Manual

Continued on next page

Commercial Procurement, Continued

SF-1165 Follow the instructions below and refer to the example on the
(continued) following page to prepare the SF-1165.

Field #	Enter the...
1	subvoucher number (This number is unit assigned).
2	Date money is received.
3	Unit issuing the money.
4	Total dollar amount. Note: You must type two asterisks before the dollar amount and asterisk fill to the right.
5	Amount in cents.
6	Total of purchase.
7	Quantity and unit of issue.
8	Item description and price.
9	Item extended price.
10	Vendor's address.
11	Contracting officer's name, and project code of the department whose account is charged for the item.
12	Accounting line and DAFIS document number.

Continued on next page

Commercial Procurement, Continued

SF-1165
(continued)

Example
SF-1165
(continued)

INTERIM RECEIPT FOR CASH		RECEIPT FOR CASH-SUBVOUCHER (To be used when invoice is not available)	
DATE _____		Received in cash from (3) USCGC IRIS (WLB 395)	
Received of Imprest Fund Cashier \$_____ for which I hold myself accountable to the United States.		(4) **Forty dollars (5) 05 (6) \$40.05 for the following:	
(Signature) _____		Vendor (10) Portland Fish Co.	
NOTE TO BANNER Be sure this receipt is marked "VOID" and returned to you when the transaction is completed or the funds returned to the Cashier.		Address 425 COMMERCIAL STREET Astoria, OR. 97654	
U.S. G.P.A. 5010-107		By _____ Title _____	
		PURPOSE (Project, etc.) PROJECT, LUNCH	
		(11) T. C. Murphy SKC, USCG	
		APPROPRIATION AND ACCOUNTING CLASSIFICATION (12) 2/S/XS8/133/HM/11401/2817 DOC ID # 26-97-137SIR180	

Continued on next page

Commercial Procurement, Continued

Practice #3 Prepare an SF-1165 to purchase the items on PR 2697217RL212 seen below. Date the SF-1165 July 31, 1997. SKC M. P. Richards (contracting officer) will sign the SF-1165. Utilize Subvoucher No.# 104-97

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF 2 PAGES

DEPARTMENT OF TRANSPORTATION <div style="display: flex; justify-content: space-around; font-size: 2em; font-weight: bold;"> P R </div> <div style="display: flex; justify-content: space-around; font-weight: bold;"> ROCUREMENT ROCESS REQUEST RAPIDLY </div>										PROCUREMENT REQUEST NO. 26-97-2176RL212			
										DATE RECEIVED			
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT FS2 Your Name										2. TYPE OF REQUEST (Check one) A. <input checked="" type="checkbox"/> NEW REQUEST			
3. ORIGINATING OFFICE DATA DINING FACILITY										B. <input type="checkbox"/> CHANGE TO PENDING PR NO.			
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) TALWE MARKET 33 Sound Road Reedsport, OREGON 97420 (503) 282-1212 Attn: Deana Wilson										C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO.			
5. APPROVALS										6. CONSIGNEE AND DESTINATION Commanding Officer USCGC Resolute (WHEC 620) c/o Coast Guard Base Astoria, OR. 97103			
APPROVING OFFICIALS		ROUTING SYMBOL	DATE	INTERNAL ROUTING		ROUTING SYMBOL							
(A)		(B)	(C)	(D)									
FS1 P. T. Bartles		FSO	12/10										
SKC J. W. Pease		ACO	12/10										
										7. DATE(S) REQUIRED JULY 31, 1997			
										8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" see par. 8 of instructions on page 2.)			
9. DESCRIPTION OF ITEMS OR SERVICES													
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)						QTY (C)	UNIT (D)	ESTIMATED COST				
									UNIT PRICE (E)	AMOUNT (F)			
1.	Crab, Alaskan King Delivery Terms: 30 days ARO FOB: destination Discount Terms: none						30	LB	7.99	239.70			
10. ACCOUNTING DATA													
SYSTEMS DATA				CHECK APPLICABLE QUARTER				TOTAL 239.70					
				<input type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input type="checkbox"/> 3RD <input checked="" type="checkbox"/> 4TH									
A	D	APPR	LIN	APC	AL	PROGRAM	COST	OBJECT	DOCUMENT NUMBER		PROJECT	ACCOUNTING AMOUNT	
Y	T	CODE	CODE	CODE	T	ELEMENT	CENTER	CLASS	TYPE	PT			P.R. NUMBER
2	6	XS6	121	82	0	RL	12106	2617	21	97	2176RL212		239.70
2					0				21				
2					0				21				

FORM DOT F 4200.1.2C3 (REV. 2-94)
PREVIOUS EDITIONS ARE OBSOLETE

Go to page 4-8 for feedback

Commercial Procurement, Continued

Order for Supplies or Services (CG-5398, OF-347)

The Order for Supplies or Services (CG-5398, OF-347) is a multi-purpose form used for the following:

- Negotiating purchases of supplies or services not in excess of the small purchase limit.
 - Ordering or scheduling deliveries against established contracts or from government sources of supply in any dollar amount.
 - A receiving report.
 - An invoice.
-

Reading Assignment

Read the following manuals for references for the CG-5398, OF-347:

- Pages 12D-50 through 12D-55 in the FINCEN SOP.
 - Chapter 5 pages 17-26 and enclosure 4 in the Small Purchase Handbook.
-

Continued on next page

Commercial Procurement, Continued

OF-347 Follow the instructions below and refer to the following page for
Preparation preparation of the OF-347:

Block	Enter...
1	Date purchase order is prepared.
2	GSA contract number if applicable.
3	AIIN number. Ref: CGAP 1204.602-90
4	Requisition /reference number. Ref: FINCEN SOP 5-1 through 5-4
5	Issuing office.
6	Address where supplies are to be shipped.
7	Vendor name and address.
8	Type of order
9	Appropriate accounting data. Note: Refer to page 4-2 in FINCEN SOP for an example of multiple accounting lines.
10	Name, office, and phone number of person who initiated the order for supplies.
11	Appropriate business classification
12	FOB (free on board) point. Example: In this case FOB destination indicates that the vendor will be responsible for shipping charges until supplies reach the destination point.
13	Place where supplies will be accepted and inspected.
14	GBL number (if applicable)
15	Date when supplies should be delivered to the FOB point.
16	Any discount terms.

Commercial Procurement, Continued

Example OF-347 Preparation (continued)

ORDER FOR SUPPLIES OR SERVICES				PAGE 1	OF PAGES 3	
IMPORTANT: MARK ALL PACKAGES AND PAPERS WITH CONTRACT AND/OR ORDER NUMBERS.						
1. DATE OF ORDER 23 Feb 1997	2. CONTRACT NO. (if any) GS-OOF-9034B	3. ORDER NO. DTCG27-97PKN121	4. REQUISITION/REFERENCE NO. 23972775KN121			
5. ISSUING OFFICE (Name, address and ZIP Code) CONTRACTING OFFICER USCG C Kennebec 4000 Coast Guard Blvd. Portsmouth, VA. 23702-2199 ATTN: Dean Seward (207) 256-3242		6. SHIP TO: (Consignee and address, ZIP Code) CONTRACTING OFFICER USCG C Kennebec 4000 Coast Guard Blvd. Portsmouth, VA. 23702-2199 SHIP VIA: Portsmouth, VA. 23702-2199				
7. TO: CONTRACTOR (Name, address and ZIP Code) Secure Containers 8716 Beach Road Virginia Beach, VA. 23339 PHONE: (207) 243-8323		8. TYPE OF ORDER <input checked="" type="checkbox"/> A. PURCHASE - Reference your <small>Please furnish the following in the terms and conditions specified on page 1 and 2 of this order and on the attached sheets, if any, including delivery or installation. This purchase is negotiated under authority of:</small> <input type="checkbox"/> B. DELIVERY - Except for billing instructions the reverse, this delivery order is subject to instructions contained on this side only of the form and is subject to the terms and conditions of the above-mentioned contract.				
9. ACCOUNTING AND APPROPRIATION DATA 2/S/501/105/30/0/T7/17003/23263		10. REQUISITIONING OFFICE SKC P. L. Morgan (far) 7313				
11. BUSINESS CLASSIFICATION (CHECK APPROPRIATE BOX(ES)) <input checked="" type="checkbox"/> SMALL <input type="checkbox"/> OTHER THAN SMALL <input type="checkbox"/> DIS-ADVANTAGED <input checked="" type="checkbox"/> WOMEN-OWNED						
12. F. O. B. POINT DESTINATION	14. GOVERNMENT B/L NO.	15. DELIVER TO F. O. B. POINT ON OR BEFORE (Date) 1/30/97		16. DISCOUNT TERMS NET 30		
13. PLACE OF INSPECTION AND ACCEPTANCE DESTINATION						
17. SCHEDULE (See Page 2 for Rejections)						
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY ACCEPTED (G)
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(B). TOT (cont. pages)
21. MAIL INVOICE TO: (Include ZIP Code)						17(D). GRAND TOTAL
22. UNITED STATES OF AMERICA BY (Signature)				23. NAME (TYPED) TITLE: CONTRACTING/ORDERING OFFICER		

OPTIONAL FORM 347 (10-83)
Prescribed by GSA
FAR (48 CFR) 53.213(e)

Continued on next page

Commercial Procurement, Continued

OF-347 Preparation (continued)

Block	Enter...
17a	Item number.
17b	Description of supplies or services you are ordering.
17c	Quantity you are ordering.
17d	Unit of issue for each item.
17e	Unit price of each item.
17f	Extended price for each item.
17g	Quantity accepted.
18	Shipping point.
19	Gross shipping weight.
20	Invoice number.
21	Finance Center address. Ref: pages 12D-20 and 12D-21 in the FINCEN SOP
22	For contracting officer's signature.
23	Complete name and title of contracting/ordering officer.

Continued on next page

Commercial Procurement, Continued

OF-347 Preparation (continued)

ORDER FOR SUPPLIES OR SERVICES						PAGE 1	OF PAGES
IMPORTANT: MARK ALL PACKAGES AND PAPERS WITH CONTRACT AND/OR ORDER NUMBERS.							
1. DATE OF ORDER		2. CONTRACT NO. (If any)		3. ORDER NO.		4. REQUISITION REFERENCE NO.	
5. ISSUING OFFICE (Name, address and ZIP Code)				6. SHIP TO: (Consignee and address, ZIP Code)			
				SHIP VIA			
7. TO: CONTRACTOR (Name, address and ZIP Code)						8. TYPE OF ORDER	
						<input type="checkbox"/> A. PURCHASE - Release you! <small>Please furnish the following on the form: and conditions specified on pages 1 and 2 of this order and on the attached sheets, if any, including delivery as indicated. This purchase is regulated under authority of:</small>	
						<input type="checkbox"/> B. DELIVERY - Receipt for billing, instructions on the reverse, and delivery order; all have instructions contained on this side only of the form and attached sheets to the form; and conditions of the above numbered contract.	
9. ACCOUNTING AND APPROPRIATION DATA				10. REQUISITIONING OFFICE			
				11. BUSINESS CLASSIFICATION (CHECK APPROPRIATE BOXES)			
				<input type="checkbox"/> MAIL <input type="checkbox"/> TELEPHONE <input type="checkbox"/> ADVERSE <input type="checkbox"/> WORKING <small>ORDER</small> <small>SMALL</small> <small>TRAGED</small> <small>COUNCIL</small>			
12. R.O.E. POINT		14. GOVERNMENT P/L NO.		15. DELIVER TO R.O.E. POINT ON CELEPHONE (If any)		16. DISCOUNT TERMS	
13. PLACE OF INSPECTION AND ACCEPTANCE							
17. SCHEDULE (See Page 2 for Rejection)							
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY RECEIVED (G)	
1.	SAFE MODEL #42553	1	EA	232.63	232.63		
PLEASE ENSURE THAT NUMBER SHOWN IN BLOCK #3 OF THIS PURCHASE ORDER IS CITED ON YOUR INVOICE							
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		TOTAL (NOT PAGE)	
21. MAIL INVOICE TO: (Include ZIP Code)		CO (2393493017023) FINCEN					
1430A KRISTINA WAY, CHESAPEAKE, VA 23326-0623				232.63		TOTAL ORDER TO TOTAL	
22. UNITED STATES OF AMERICA BY (Signature)				23. NAME (Typed)		E. S. RUTHERFORD, SEC, USCG	
				TITLE CONTRACTING ORDERING OFFICER			

OPTIONAL FORM 347 (10-83)
Prescribed by GSA
FAR (48 CFR) 53.213(d)

Continued on next page

Commercial Procurement, Continued

Practice #4 You're the FS2 at Station Ft. Pierce Florida. Prepare an OF-347 to purchase the items on **PR 21972877FP314** seen on the following page. The following applies

- Date the OF-347: 25SEP1997
- M.D. Zimms (contracting officer) will sign the purchase order.
- Mary's Cake Decorating Supplies is a woman owned business.
- The address of the contracting officer at Station Ft. Pierce Florida

Contracting Officer
USCG Station Ft. Pierce
Panama City, FL. 86754-0030
Phone: (211) 845-3089

- The ship to address is:

Contracting Officer
USCG Station Ft. Pierce
234 Crabtree Road
Panama City, FL 86754-0030

Continued on next page

Commercial Procurement, Continued

Practice #4 continued

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF 9 PAGES

DEPARTMENT OF TRANSPORTATION										PROCUREMENT REQUEST NO. 21972877FP314			
P R ROCESS REQUEST										DATE RECEIVED			
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT FS2 Your Name										2. TYPE OF REQUEST (Check one)			
3. ORIGINATING OFFICE DATA Galley										A. <input checked="" type="checkbox"/> NEW REQUEST			
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) MARY'S Cake Decorating Supplies 67823 Market Street Fort Pierce, FL 23773 PHONE: (211) 555-5555										B. <input type="checkbox"/> CHANGE TO PENDING PR NO.			
										C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO.			
5. APPROVALS										6. CONSIGNEE AND DESTINATION Commanding Officer USCG Station Ft. Pierce Panama, City, FL. 86754-5000 Attn: FS2 Your Name			
APPROVING OFFICIALS (A)	ROUTING SYMBOL (B)	DATE (C)	INITIALS (D)	ROUTING SYMBOL									
FSC I. B. Fine	SC	9/15											
M. D. Zimme	far	9/15											
										7. DATE(S) REQUIRED September 25, 1997			
										8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" see par. 8 of instructions on page 2.)			
9. DESCRIPTION OF ITEMS OR SERVICES													
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)	QTY (C)	UNIT (D)	ESTIMATED COST									
				UNIT PRICE (E)	AMOUNT (F)								
1.	Copy Cake	1	EA	240.00	240.00								
10. ACCOUNTING DATA													
SYSTEMS DATA			CHECK APPLICABLE QUARTER										
			<input checked="" type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input type="checkbox"/> 3RD <input type="checkbox"/> 4TH										
			TOTAL 240.00										
A B Y	APPN CODE	UIN CODE	APC CODE	A L T	PROGRAM ELEMENT	COST CENTER	OBJECT CLASS	TYPE	FY	P.R. NUMBER	SUFFIX	PROJECT	ACCOUNTING AMOUNT
2	7	701	107	30	0	FP	30309	2687	21	97	2877FP314		240.00
2					0				21				
2					0				21				

FORM DOT F 4200.1.2CG (REV. 2-84)
PREVIOUS EDITIONS ARE OBSOLETE

Go to page 4-9 for feedback

Commercial Procurement, Continued

Blanket Purchase Agreement

A Blanket Purchase Agreement (BPA) is a method of filling repetitive needs for small quantities of related supplies or services by establishing "charge accounts" with established sources of supply.

Reading Assignment

Read the below listed manuals for information regarding rules and regulations for BPA's:

- You must have read chapter 5 in the Small Purchase Handbook
- Pages 12D-50 through 12D-55 in the FINCEN SOP

Note: Enclosure 6 in the Small Purchase Handbook includes a BPA instruction letter for Subsistence Specialists.

Continued on next page

Commercial Procurement, Continued

Practice #5 Complete the following statements using your reading assignment as a reference:

- When placing a call against a BPA, the authorized caller must assign a _____.
- As the vendor supplies the material to the unit, he/she must also provide a _____.
- All calls against a BPA must be recorded on a _____ and submitted to Finance Center with delivery tickets _____.

GO to page 4-10 for feedback

Commercial Procurement, Continued

Commercial Procurement, Continued

Government-wide Commercial Credit Card The Government-wide Commercial Credit Card is a procurement tool utilized for small purchases based on the individual cardholder's procurement authority. It can be used in lieu of cash, BPA's, SF-44's and purchase orders.

Reading Assignment For information on procedures, rules and regulations regarding credit card purchases, read the following references:

- You must read Chapter 5 in the Small Purchase Handbook
 - Pages 12D-99 through 12D-110 in the FINCEN SOP
-

Continued on next page

Commercial Procurement, Continued

Practice #7 You are stationed at TRACEN Petaluma. Using the IMPAC Credit Card purchase ground beef for the dining facility totaling \$489.00. The following applies and should be recorded on a Unit Call Sheet. Use the example provided on the following page.

- Issued by: USCG TRACEN PETALUMA
Call Sheet
Attn: Jack-of-the-Dust
- Vendor: Ritz Food Service
P. O. Box 69
Santa Rosa, CA. 95402
- Item information: Ground Beef, 300 lbs. (85-15) at \$1.63 per pound
- IMPAC Credit Card Number: 3294**1234**B123
(record bold numbers to call sheet)
- Requisitioner/Authorized Caller(s):
FSC J. L. Eisen/FSCS D. A. Karbo
- Julian Date: 4123 (FY is 94, Julian date is 123)
- Invoice number (from vendor): AP 15861
- Call Number: #001

Note: After placing the order the authorized caller MUST initial the log. Upon receipt of the merchandise you must also record the vendor invoice number on the call sheet to be sent to the Finance Center.

Continue on next page

Practice #7 Call Sheet

MONTH _____

VENDOR: RITZ FOOD SERVICE
ADDRESS: P. O. BOX 69
SANTA ROSA, CA. 95402
PHONE NO.: (800) 998-9070
POC:

CALLER NAME:
CALLER NAME:
CALLER NAME:

SIGNATURE:
SIGNATURE:
SIGNATURE:

[illegible]

SUB TOTAL _____

LESS CREDITS

ACCT: 2/Q/XS6/174/PT/0/82/61200/2617

GRAND TOTAL _____

Continued on next page

Commercial Procurement, Continued

Request for Quotations (SF-18) The Request for Quotations (SF-18) is used in obtaining price, cost and delivery related information from suppliers for small purchases. You should solicit an SF-18 when a purchase meets one of the following:

- Too many line items to obtain an oral quote.
 - Difficulty to get a hold of vendor (e.g. different time zones, unit underway, etc.).
 - Complex specifications.
-

Reading Assignment For information procedures, rules and regulations regarding quotes, read the following in the Small Purchase Handbook:

- Chapter 6 pages 1 through 3
-

Continued on next page

Commercial Procurement, Continued

SF-18 Follow the instructions below and refer to example on page 3-26 to
Preparation prepare the necessary blocks on the SF-18:

On top of the form enter a check indicating that the small purchase set on page two "is applicable". You must also enter the page numbers in the appropriate block.

Block	Enter...
1	<i>Not used.</i>
2	The date the SF-18 is typed.
3	Quote number.
4	<i>Not used.</i>
5A	Address of unit issuing SF-18.
5B	Name and number of point of contact the vendor can call concerning the items.
6	Date items or services are needed.
7	<i>Not used.</i>
8	Vendor's address
9	Address where items are to be shipped or where the services will be performed.
10	Date quotations are to be furnished to you by.
11	<i>Not used.</i>
12	Descriptions of supplies or services requiring quotes and quantity.
13-18	<i>Not used.</i>

Continued on next page

SF-18

Preparation (continued)

2-26

Commercial Procurement, Continued

Practice #8 You're at the Coast Guard Academy procurement and have been tasked with soliciting three quotes for a new "walk-in" type freezer for the galley. The following applies:

- Issued by/destination address:
Contracting Officer
U.S. Coast Guard Academy
New London, CT 06320
- Item information: Hobart Freezer, Model #1010AF
- Requisition number: DTCG-32-95JAD020
- Information name/number: FS2 Your Name
Phone number: (332) 525-2738
- Date: 15 Jun 95
- Date quotation required: 15 JUL 1995
- Date item needed: 15 August 1995

Listed below are the three vendors:

- Ape Appliance
313 N. Main
Baltimore, MD 04035
- Silva's Appliance
1800 Piner Dr.
Alexandria, VA 05986
- Aikman Refrigeration Co.
12 Stoneypoint Rd
Glen Burnie, MD 04872

Go to pages 4-15, 4-16 and 4-17 for feedback

Commercial Procurement, Continued

Amendment of Solicitation/Modification of Contract (SF-30)	The Amendment of Solicitation/Modification of Contract (SF-30) is used to modify existing purchase orders.
---	--

Reading Assignment	Read pages 12D-31 through 12D-44 in the FINCEN SOP.
---------------------------	---

Additional Information	<p>An SF-30 is required when modifying or changing the following Purchase Order (PO) items:</p> <ul style="list-style-type: none">• PO Number.• Issuing and ship to address.• Contractor Name and address.• Accounting and appropriation data.• Shipping terms.• Line items: Changes in quantity, or additions/deletions.• Total order increases of more than \$50.00.• Cancellation of the PO.
-------------------------------	--

Continued on next page

Commercial Procurement, Continued

SF-30 Follow the steps below and refer to the example on the next page
Preparation for instructions on preparing the SF-30:

Block	Enter...
1	Contract ID code (if applicable).
2	Amendment/Modification number.
3	Date SF-30 is prepared.
4	Purchase request number.
5	Project request number.
6	Name and address of unit issuing modification. (Same as block #5 on purchase order you are modifying).
7	<i>Self explanatory</i>
8	Name and address of contractor/vendor. (Block #7 on purchase order you are modifying.).
9A	<i>Self explanatory</i>
9B	<i>Self explanatory</i>
10	Purchase order number of PO you are modifying.
11	<i>Self explanatory</i>
12	Use only for modification of contract.
13A	"FAR part 13".
13B	<i>Self explanatory</i>
13C	<i>Self explanatory</i>
13D	<i>Self explanatory</i>
14	Description of modifications
15A	<i>Self explanatory</i>
15B	<i>Self explanatory</i>
16A	Name and title of contracting officer.
16B	<i>Self explanatory</i>
16C	Date the contracting officer signs SF-30.

Commercial Procurement, Continued

SF-30 Preparation (continued)

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE	PAGE OF PAGES
2. AMENDMENT/MODIFICATION NO. 002		3. EFFECTIVE DATE		4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (if applicable)
6. ISSUED BY CONTRACTING OFFICER US COAST GUARD ACADEMY 534 MOHEGAN AVE. NEW LONDON, CT. 06320		7. ADMINISTERED BY (if other than Issuer)		CODE	
2. NAME AND ADDRESS OF CONTRACTOR (Name, street, suite, floor and ZIP Code) SNAP ON TOOLS 629 MERCHANT STREET HARTFORD, CT. 06575				(X)	8A. AMENDMENT OF SOLICITATION NO.
					8B. DATED (SEE ITEM 11)
				X	10A. MODIFICATION OF CONTRACT ORDER NO. DTCG24-93-P-GTE002
					10B. DATED (SEE ITEM 13) 24 JUL 93
CODE		FACILITY CODE		11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS	
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by date of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment and is received prior to the opening hour and date specified. 12. ACCOUNTING AND APPROPRIATION DATA (if required)					
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT ORDERS, IT MODIFIES THE CONTRACT ORDER NO. AS DESCRIBED IN ITEM 14.					
(X) A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. F.A.R. PART 13					
B. THE ABOVE NUMBER CONTRACT ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as change in type, quantity, unit price, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).					
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:					
D. OTHER (Specify type of modification and authority)					
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies of the Issuing Office.					
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Describe in detail, including solicitation number, contract number, and item number, if applicable.) 1. AMMEND BLOCK 14 LINE 1 TO READ \$654.00 IN LIEU OF \$554.00 - INCREASE OF \$100.00					
RECAP: OLD PURCHASE ORDER TOTAL: \$554.00 INCREASE \$100.00 NEW PURCHASE ORDER TOTAL: \$654.00					
Except as provided herein, all terms and conditions of the documents referenced in Item 9 A and 10 A, as hereinafter changed, remain unchanged and in full force and effect.					
15A. NAME AND TITLE OF SIGNER (Type or Print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or Print) M. L. MICHALES SKC, USCG			
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED 15 SEP 93		
(Signature of Contractor Official)		(Signature of Contracting Officer)			
NSN 7540-01-152-3070 PREVIOUS EDITION UNUSABLE		STANDARD FORM 30 (Rev. 10-83) Prescribed by GSA FAR (48 CFR) 53.243			

Continued on next page

Commercial Procurement, Continued

Practice #9 Prepare a SF-30 based on the procurement request seen on the following page modifying the purchase order from practice #4. The following applies:

- Date of SF-30: 27 SEP 97
- Modification number: 001
- Modification will be signed by SKC F. L. Reams on 27 SEP 97.

Continue to next page

Commercial Procurement, Continued

Practice #9 (continued)

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF PAGES

DEPARTMENT OF TRANSPORTATION										PROCUREMENT REQUEST NO. 2698317LFN001			
PROCUREMENT REQUEST PROCESS RAPIDLY										DATE RECEIVED			
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT FS2 Your Name (501) 265-5557										2. TYPE OF REQUEST (Check one)			
3. ORIGINATING OFFICE DATA Galley										A. <input checked="" type="checkbox"/> NEW REQUEST			
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) Sysco 543 Lofton Ave. Alameda, CA. 94953 Phone: (510) 623-2373										B. <input type="checkbox"/> CHANGE TO PENDING PR NO.			
										C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO.			
5. APPROVALS										6. COMMOBEE AND DESTINATION Commanding Officer USCG Gorup San Francisco Coast Guard Island Alameda, CA. 94952-5000			
APPROVING OFFICIALS		ROUTING SYMBOL	DATE	INTERNAL ROUTING		ROUTING SYMBOL							
(A)		(B)	(C)	(D)		(E)							
FSC Finnes		SC	9/19/97										
B. D. Potemkin		far	9/19/97										
										7. DATE(S) REQUIRED October 1, 1997			
										8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" use par. 8 of instructions on page 2.)			
9. DESCRIPTION OF ITEMS OR SERVICES													
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)						QTY (C)	UNIT (D)	ESTIMATED COST				
									UNIT PRICE	AMOUNT			
1.	Blanket Purchase Agreement for supplies and services not to exceed \$2500.00 per call. This BPA will be for the period 01 OCT 97 through 30 SEP 98. Listed below is a list of authorized callers: CWO2 B. Parker FSC A. Gonzales FS1 M. Delaney FS2 Your Name												
10. ACCOUNTING DATA													
SYSTEMS DATA				CHECK APPLICABLE QUARTER				TOTAL					
				<input checked="" type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input type="checkbox"/> 3RD <input type="checkbox"/> 4TH									
A	B	APPN	LM	APC	A	PROGRAM	COST	OBJECT	DOCUMENT NUMBER			PROJECT	ACCOUNTING AMOUNT
Y	T	CODE	CODE	CODE	L	ELEMENT	CENTER	CLASS	TYPE	FY	P.R. NUMBER		
2	1	XS6	131	62	0	FN	36269	2645	21	98	317LFN001		
2					0				21				
2					0				21				

FORM DOT F 4200.1 2CG (REV. 2-94)
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Go to page 4-18 for feedback

Chapter 3

Government Procurement

Intro- duction

In this section you will learn to prepare the following forms to complete purchases from government sources.

- SF 44 "Green Sheet" Multi line requisition form
- CG 4940 Requisition Log

References

You will need the following manuals to complete this section.

- Supply Policy and Procedures Manual(COMDINST M4400.series)
- Finance Center SOP (FINCENSTINST M7000.series)

continued on next page

Government Procurement, Continued

Federal Supply Catalog

The Federal Supply Catalog is a government - wide program administered by the General Services Administration (GSA) and the Department of Defense (DOD).

Each item of supply included in the Federal Supply Catalog has its own National Stock Number(NSN). The NSN consists of a 4 digit Federal Supply Classification code (FSC) and a nine digit National Item Identification Number

Reading Assignment

Read part III chapters 1 and 2 in the Supply Policy and Procedures Manual.

continued on the next page

Government Procurement, Continued

MILSTRIP

The word MILSTRIP stands for MILitary Standard Requisitioning and Issue Procedure. The MILSTRIP system provides the requisitioned with a common language for making their requirements known and the means for supply sources to automate the processing of requisitions. The main features are:

- Reduction of data to an abbreviated form for machine processing.
 - Processing requisitions and issuing material on a Multi Line Item (form SF344)
 - Processing requisitions and issuing material on a Requisition Log (CG-4949), and
 - Application of a uniform issue priority system to establish the delivery requirement in specific time frames.
-

ARMS

Automated Requisition Management System is the standardized requisitioning system authorized for all Coast Guard units. It is a user friendly system which allows the user to initiate requisitions and follow- on actions through a standard workstation.

Reading Assignment

- Read part VI, Chapters 1 and 2 in Supply Policy and Procedures Manual
 - Read Section E page 12E-4 paragraph 7 on Reserved Fund Codes in the Finance Center SOP
 - Read Section E pages 12E-10 through 12E-14 for information on ARMS.
-

Continued on the next page

Government Procurement, Continued

The SF344 is a multi-line item requisition form. This means that any number of different items may be ordered by using one form, rather than a separate form for each item. In most instances the requisitioner will fill out the lower portion of the form and submit it to the supply office for processing.

Continued on next page

Government Procurement, Continued

The SURF Requisition Log (CG-4940) is also a multi-line item requisition form. As with the SF-344 the requisitioner fill out the appropriate ordering information i.e. stock number, unit of issue, quantity desired, cost, fund code (if known), obligation amount and nomenclature. The form is then forwarded to the supply office for processing.

[illegible]

3-5

Government Procurement, Continued

Practice #1 You have been tasked with ordering the following items on a SF344.

ITEM	U/I	STOCK NUMBER	QUANTITY	COST
SCRUB BRUSH	EA	7920-00-061-0038	3	\$2.48
OVEN CLEANER	GL	7930-01-075-0776	4	\$3.69
POLISHING PADS	BX	7920-00-891-7573	1	\$29.32
GRIDDLE SCREEN	BX	7920-01-162-6064	1	\$31.68
HOLDER, SCOURING PADS	KT	7920-01-222-3521	1	\$12.52
MEMORANDUM BOOK	EA	7530-00-222-3521	4	\$1.43
BALLPOINT PEN	DZ	7520-01-060-5820	2	\$2.35
CARTON OPENER	EA	5110-00-345-5289	1	\$19.50

Go to page 4-19 for feedback

Continued on the next page

Government Procurement, Continued

Practice #2

You have been tasked to order the following subsistence supplies on a SURF Log (CG-4940)

Item	U/I	STOCK NUMBER	QUANTITY	COST
MARGERINE	LB	8945-00-935-6854	60	0.65
BEANS, REFRIED	CN	8940-00-348-6976	6	3.45
HONEY	JR	8925-01-080-1179	24	2.32
CATSUP	BT	8950-00-127-9790	24	1.68
CLOVES, GROUND	CN	8950-00-539-9541	1	12.52
APPLE SAUCE, INSTANT	CN	8915-00-655-5718	24	1.43
BACON,SLICED PRECOOKED	CN	8905-01-243-0100	6	16.35
CHICKEN	LB	8905-00-582-1340	200	1.78

CONTINUE TO PAGE 4-20 FOR FEEDBACK

Chapter 4

CHAPTER 1 FEEDBACK

PRACTICE #1

FS1 Fiori, on board the USCGC Northwind (D-11), is issuing a cash sub voucher to purchase milk. The program element is NW and the document sequence number is 101. Verify your standard document number against the one listed below.

26-95-315LNW101

FS2 Rollins, on the USCGC Revenge (D-7 MLCLANT unit), is preparing a SF-44 to purchase doughnuts from a local vendor. The program element is RV and the document sequence number is 718. Verify your standard document number against the one listed.

26-95-8053RV718

FSC lth of Group Mobile (a D-8 unit) is preparing a purchase order to purchase produce. The program element is GM and the document sequence number is 912. Verify your standard document number against the one listed below.

26-95-2958GM912

FSCM McGraw of Base Honolulu (a D-14 unit) wants to set up a blanket purchase order with the local vendor. The program element is BH and the document sequence number is 011. Verify your standard document number against the one listed below.

26-95-3454BH011

continued on the next page

CHAPTER 1 FEEDBACK, CONTINUED

Practice # 2

Today is August 31 1995. FS2 Gonzales ordered subsistence supplies with a government VISA card. The vendor is shipping the items today. The VISA card number is 3762928343. The banks transaction sequence number is 1221*. Write the nonstandard document number for the above transaction on the blank line below.

32-95-0091B0241201

Today is May 4, 1995. FSCS Peters shipped a DFOS using Federal Express. The carriers airbill number is R927523845, the suffix is 112*. Write the nonstandard document number for the above transaction in the blank line below.

32-95-013489134001

Write the correct DAFIS nonstandard document number for MILSTRIP document number Z2076458930123, on the blank line below.

3593202763235009

Note: For this exercise the suffix and sequence numbers are included as part of the DAFIS Accounting Line. However, you CANNOT add these numbers as they are included by the FINCEN.

Write the correct DAFIS nonstandard document number for the below listed GSA customer service order scenario.

Date: 10/02/95
OPFAC: 15222
Ticket #: 98654098

3595202680228418

Continued on the next page

CHAPTER 1 FEEDBACK, CONTINUED

Practice #3	<u>Document Number</u>	<u>Document Type</u>	<u>AIIN Number</u>
	21 95 49 5 3TR043	BPA Supply Fund 82	
	<u>Response: DTCG-49-95-V-TRA043</u>		
	21 95 27 5 CGR112	Purchase Order UNICOR	
	<u>Response: DTCG-27-95-W-CGR112</u>		
	21 95 27 5 LY3235	Delivery Order	
	<u>Response: DTCG-27-95-F-LY3235</u>		
	21 95 30 5 RSC098	Agreement	
	<u>Response: DTCG-27-95-A-RSC098</u>		

Continued on the next page

CHAPTER 1 FEEDBACK, CONTINUED

Practice # 4

The year is 1997. FS2 Perkins is aboard USCGC PT. Doran (a D-13 unit) and issues a Purchase Order for program element **PD**, using a document sequence number **404**.

DTCG-80-97-S-PD404

The year is 1996. FSCS Malathion is attached to USCG Support Center Portsmouth (a D-5 unit) and is preparing a delivery order for produce. The program element charged for this transaction is **PH**, and the document sequence number is **013**. Verify the number you constructed against the one listed below.

DTCG-27-96-V-PH013

The year is 1996. FS2 Pearson, attached to the USCG Reliance (a MLCLANT unit), is typing a Request for Training (SF-182). The program element used is **RL** and the document sequence number is **642**. Verify the number you constructed against the one listed below.

DTCG-80-96-F-RL642

The year is 1997. FS1 Prose is attached to USCG Base Honolulu (a D-14 unit), and is preparing a blanket purchase agreement. The program element is **HL**, and the document sequence number is **202**. Verify the number you constructed against the one listed below.

DTCG-34-96-V-HL202

CONTINUED ON THE NEXT PAGE

CHAPTER 1 FEEDBACK, CONTINUED

Practice #5 **2/L/XS6/111/82/0/PE/14502/2617**
(1) (2) (3) (4) (5) (6) (7) (8) (9)

1. AGENCY CODE
2. REGION/DISTRICT CODE
3. APPROPRIATION CODE
4. APPROPRIATION LIMITATION CODE (ALC)
5. ALLOTMENT FUND CONTROL CODE (AFC)
6. ALLOTMENT LEVEL INDICATOR CODE (ALIC)
7. PROGRAM ELEMENT (PE)
8. COST CENTER
9. DOT STANDARD OBJECT CLASS

CHAPTER 1 FEEDBACK, CONTINUED

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF PAGES

DEPARTMENT OF TRANSPORTATION										PROCUREMENT REQUEST NO. 219533SSZZ024	
<div style="display: flex; justify-content: space-around; font-size: 2em; font-weight: bold;"> P R </div> <div style="display: flex; justify-content: space-around; font-weight: bold;"> ROCUREMENT PROCESS REQUEST RAPIDLY </div>										DATE RECEIVED 02 June, 1995	
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT FS2 Your Name /Ext. 8381										2. TYPE OF REQUEST (Check one)	
3. ORIGINATING OFFICE DATA Galley										A. <input checked="" type="checkbox"/> NEW REQUEST	
4. ADDITIONAL INFORMATION (Suggested supply sources, security class, etc.) Economics Laboratories 2041 Coronado Parkway Portland, OR. 95954 Phone: (808) 764-7777										B. <input type="checkbox"/> CHANGE TO PENDING PR NO.	
POC: Bill Walters										C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO.	
5. APPROVALS										6. CONSIGNEE AND DESTINATION OFFICER IN CHARGE U. S. COAST GUARD STATION Coos Bay, Oregon 94954 Attn: FS1 Janson	
APPROVING OFFICER (A)	ROUTING SYMBOL (B)	DATE (C)	INTERNAL ROUTING								
			INITIALS (D)	ROUTING SYMBOL							
FS1 Janson	FSO	05/15/95									
BMCM J. Donovan	OIC	05/15/95									
										7. DATE(S) REQUIRED June 15, 1995	
										8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" see par. 1 of instructions on page 2.)	
9. DESCRIPTION OF ITEMS OR SERVICES											
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)						QTY (C)	UNIT (D)	ESTIMATED COST		
									UNIT PRICE (E)	AMOUNT (F)	
1.	Soil Master Detergent part number D717634454						13	CS	\$143.00	\$1716.00	
2.	Jet Dry part number C272643						08	CS	\$32.00	\$256.00	
GSA Contract GS-OOF-80012 Expires 30 SEP 1999 FOB: Destination Delivery Terms: 30 days ARO Payment Terms: Net 30 days											
10. ACCOUNTING DATA											
SYSTEMS DATA					CHECK APPLICABLE QUARTER					TOTAL \$1972.00	
					<input type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input checked="" type="checkbox"/> 3RD <input type="checkbox"/> 4TH						
AGT	DS	APPN CODE	UM CODE	AFC CODE	ALT	PROGRAM ELEMENT	COST CENTER	OBJECT CLASS	DOCUMENT NUMBER		
2	S	501	113	30	0	ZZ	30478	2634	21	95	335SSZZ024
2					0				21		
2					0				21		
PROJECT										ACCOUNTING AMOUNT	
										\$1972.00	

FORM DOT F 4200.1-2CG (REV. 2-94)
PREVIOUS EDITIONS ARE OBSOLETE

Continued on next page

Practice #2

4-7

Chapter 2 Feedback, Continued

Practice #3

<p>INTERIM RECEIPT FOR CASH</p> <p>DATE _____</p> <p>Received of Imprest Fund Cashier \$_____ for which I hold myself accountable to the United States.</p> <p>_____ (Signature)</p> <p>NOTE TO SIGNER Be sure this receipt is marked "VOID" and returned to you when the transaction is completed or the funds returned to the Cashier.</p> <p><small>U.S. G.P.O.: 1989-271-287</small></p>	<div style="display: flex; justify-content: space-between;"> <div> <p><small>Standard Form 1145 Revised (6-83) Department of the Treasury 1 TPRM 4-400 1145-108</small></p> </div> <div style="text-align: center;"> <p>RECEIPT FOR CASH—SUBVOUCHER</p> <p><small>(To be used when invoice is not available)</small></p> </div> <div> <p><small>Subvoucher No. 104-97 Date 31 July 97</small></p> </div> </div> <p>Received in cash from <u>USCG C Resolute (WMBC 620)</u> <u>**Two hundred thirty nine dollars*****</u> and <u>70</u> (\$ <u>239.70</u>) for the following:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">QUANTITY</th> <th style="width: 65%;">ARTICLES OR SERVICES</th> <th style="width: 20%;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td>30 LB</td> <td>Crab, Alaskan King @ 7.99</td> <td>\$239.70</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>Vendor <u>Alvin's Market</u> Address <u>3 Cone Avenue</u> <u>Coos Bay, OR. 97420-0001</u></p> <p>By _____ <small>(Signature of Vendor/Agent)</small></p> <p>Title _____</p> <div style="display: flex; justify-content: space-between;"> <div> <p><small>PURPOSE (Project, etc.)</small> PROJECT, LUNCH</p> <p>M. P. Richards SKC, CONTRACTING OFFICER</p> </div> <div> <p><small>APPROPRIATION AND ACCOUNTING CLASSIFICATION</small> 2/6/XS6/121/82/0/RL/12106/2617</p> <p>DOC ID # 26-97-2176RL212</p> </div> </div>	QUANTITY	ARTICLES OR SERVICES	AMOUNT	30 LB	Crab, Alaskan King @ 7.99	\$239.70									
QUANTITY	ARTICLES OR SERVICES	AMOUNT														
30 LB	Crab, Alaskan King @ 7.99	\$239.70														

Continued on next page

CHAPTER 2 FEEDBACK, CONTINUED

Practice # 4

4

ORDER FOR SUPPLIES OR SERVICES				PAGE 1	OF PAGES 1	
IMPORTANT: MARK ALL PACKAGES AND PAPERS WITH CONTRACT AND/OR ORDER NUMBERS.						
1. DATE OF ORDER 25 September 1997		2. CONTRACT NO. (If any)		3. ORDER NO. DTCG-28-97-P-FP314		
5. ISSUING OFFICE (Name, address and ZIP Code) CONTRACTING OFFICER USCG Station Pt. Pierce Panama City, FL. 86754-0030 PHONE: (211) 845-3089		4. REQUISITION/REFERENCE NO. 21972877FP314				
7. TO: CONTRACTOR (Name, address and ZIP Code) MARY'S Cake Decorating Supplies 67823 Market Street Fort Pierce, FL. 23773 PHONE: (211) 555-5555		6. SHIP TO: (Consignee and address, ZIP Code) CONTRACTING OFFICER USCG Station Pt. Pierce Panama City, FL. 86754-0030 SHIP VIA:		8. TYPE OF ORDER <input checked="" type="checkbox"/> A. PURCHASE - Reference your <small>Please furnish the following on the terms and conditions specified on page 1 and 2 of this order and on the attached sheets, if any, including delivery as indicated. This purchase is negotiated under authority of:</small> <input type="checkbox"/> B. DELIVERY - Except for filling instruments on the terms, this delivery order is subject to instructions contained on this slide only of the form and subject to the terms and conditions of the above-mentioned contract.		
9. ACCOUNTING AND APPROPRIATION DATA 2/7701/107/30/Q/FP/30309/2687		10. REQUISITIONING OFFICE PS2 Your Name				
12. P. O. B. POINT DESTINATION		14. GOVERNMENT B/L NO.		11. BUSINESS CLASSIFICATION (CHECK APPROPRIATE BOX(ES)) <input type="checkbox"/> SMALL <input type="checkbox"/> OTHER THAN SMALL <input type="checkbox"/> DIS-ADVANTAGED <input checked="" type="checkbox"/> WOMEN-OWNED		
13. PLACE OF INSPECTION AND ACCEPTANCE DESTINATION		15. DELIVER TO P. O. B. POINT ON OR BEFORE (Date) PURCHASE AGREEMENT SEE SCHEDULE		16. DISCOUNT TERMS NET 30		
17. SCHEDULE (See Page 2 for Rejections)						
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY ACCEPTED (G)
1.	Copy Cake MR. VENDOR, ENSURE THAT THE NUMBER SHOWN IN BLOCK #3 OF THIS PURCHASE ORDER IS CITED ON YOUR INVOICE.	1	EA	240.00	240.00	
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(TD.TOT (cont. PWS))
21. MAIL INVOICE TO: (Include ZIP Code)		CO (21972877FP314) FINCEN 1430A KRISTINA WAY, CHESAPEAKE, VA. 23326-0623 FOR VENDOR PAYMENT INQUIRIES (804) 523-6940				17(O). GRAND TOTAL
22. UNITED STATES OF AMERICA BY (Signature)				23. NAME (TYPED) M. D. Zimm TITLE: CONTRACTING/ORDERING OFFICER		

OPTIONAL FORM 347 (10-83)
Prescribed by GSA
FAR (48 CFR) 53.213(e)

Continued on next page

Chapter 2 Feedback, continued

Practice #5

Compare the following statements with those you completed on page 3-21:

- When placing a call against a BPA, the authorized caller must assign a **call number**.
- As the vendor supplies the material to the unit, he/she must also provide a **delivery ticket**.
- All calls against a BPA must be recorded on a **call record sheet** and submitted to Finance Center with delivery tickets **monthly**.

Continued on next page

Chapter 2 Feedback, continued

Practice # 6

ORDER FOR SUPPLIES OR SERVICES				PAGE 1	OF PAGES 3	
IMPORTANT: MARK ALL PACKAGES AND PAPERS WITH CONTRACT AND/OR ORDER NUMBERS.						
1. DATE OF ORDER 01 OCT 97		2. CONTRACT NO. (If any)		3. ORDER NO. DTCG31-97-VFN001		
		4. REQUISITION/REFERENCE NO. 2698317VFN001				
5. ISSUING OFFICE (Name, address and ZIP Code) CONTRACTING OFFICER USCG Group San Francisco Coast Guard Island Alameda, CA. 94952-5000 Phone: (510) 765-5500			6. SHIP TO: (Consignee and address, ZIP Code) SAME AS BLOCK #5			
7. TO: CONTRACTOR (Name, address and ZIP Code) Sysco 543 Lofton Ave. Alameda, Ca. 94953 Phone: (510) 623-2373			8. TYPE OF ORDER <input checked="" type="checkbox"/> A. PURCHASE - Reference your <small>Please furnish the following on the terms and conditions specified on page 1 and 2 of this order and on the contract sheets, if any, including delivery as indicated. This purchase is negotiated under authority of:</small> <input type="checkbox"/> B. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of the form and is subject to the terms and conditions of the above-mentioned contract.			
9. ACCOUNTING AND APPROPRIATION DATA			10. REQUISITIONING OFFICE PS1 DEBRA HOWARD (SUPPLY) 5555			
			11. BUSINESS CLASSIFICATION (CHECK APPROPRIATE BOX(ES)) OTHER <input checked="" type="checkbox"/> SMALL <input type="checkbox"/> THAN SMALL <input type="checkbox"/> DIS-ADVAN. <input type="checkbox"/> TAGED <input type="checkbox"/> WOMEN-OWNED			
12. P.O.B. POINT DESTINATION		14. GOVERNMENT B/L NO.		15. DELIVER TO P.O.B. POINT ON OR BEFORE (Date) PURCHASE AGREEMENT SEE SCHEDULE		
13. PLACE OF INSPECTION AND ACCEPTANCE SAME AS BLOCK #5				16. DISCOUNT TERMS NET 30		
17. SCHEDULE (See Page 2 for Rejections)						
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY ACCEPTED (G)
1.	THIS IS A BLANKET PURCHASE AGREEMENT FOR VARIOUS ITEMS OR SERVICES WHICH THE CONTRACTOR MAY BE IN A POSITION TO DELIVER TO THE U. S. COAST GUARD. IF ANY, WHEN REQUESTED BY THE CONTRACTING OFFICER OR AN AUTHORIZED REPRESENTATIVE DURING THE PERIOD OF 1 OCT 93 THROUGH 30 SEP 94. (SEE CONTINUATION SHEETS)					
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		1700.TOT (cont. page)
21. MAIL INVOICE TO: (Include ZIP Code) SAME AS BLOCK #5						1701. GRAND TOTAL
22. UNITED STATES OF AMERICA BY (Signature)				23. NAME (TYPED) S. B. Carson, SKC, USCG TITLE: CONTRACTING/ORDERING OFFICER		

OPTIONAL FORM 347 (10-83)
Prescribed by GSA
FAR (48 CFR) 53.213(e)

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #6 continued

ORDER FOR SUPPLIES OR SERVICES SCHEDULE - CONTINUATION						PAGE NO. 2 of 3
IMPORTANT: Mark all packages and papers with contract and/or order numbers						
DATE OF ORDER 01 OCT 97			CONTRACT NUMBER DTCG31-97-VFN001		ORDER NUMBER 2698317VFN001	
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY ACCEPTED (G)
2.	EXTENT OF OBLIGATION: The Government is not obligated to order any supplies or services under this agreement. The Government reserves the right to award contracts or agreements to other vendors for like supplies or services during the same period of this agreement. The Government is obligated under this Agreement only to the extent of authorized calls actually placed against this Agreement.					
3.	PURCHASE LIMITATIONS: An individual call placed under this Agreement shall not exceed \$2,500.00.					
4.	PRICING COMPLIANCE: The vendor warrants by performance of any call placed under this Agreement that the prices charged the Government shall be as low or lower than those charged most favored customers for comparable quantities under similar terms and conditions including any discounts for prompt payments. The vendor shall provide current pricing catalog to purchasing office, if and when requested by the Contracting Officer.					
5.	<p>ORDERING PROCEDURES AND LIMITATIONS:</p> <p>a. Call Orders: Calls placed under this Agreement will generally be made by oral solicitation without written confirmation by the Government. Each call will be assigned an identification number.</p> <p>The identification number along with the BPA number shown on the First page of this agreement shall be used when calls are placed by the ordering activity and the vendor in the preparation of delivery tickets and invoices.</p> <p>b. AUTHORITY TO PLACE CALLS: ALL CALLS PLACED WITH THE VENDOR UNDER THIS AGREEMENT MUST BE ACCOMPANIED BY A BPA "CALL NUMBER" AUTHORIZED BY THE CONTRACTING OFFICER. THE ROSTER BELOW INDICATES THOSE PERSONNEL WHO HAVE BEEN GRANTED AUTHORITY TO PLACE ORDERS AND COMMIT GOVERNMENT FUNDS.</p> <p><u>Personnel who are authorized to place calls:</u></p> <p>CWO2 B. Packer FSC A. Gonzales FS1 M. Delaney FS2 Your Name</p>					
TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))						

OPTIONAL FORM 348(10-83)
Prescribed by GSA
FAR (48CFR) 53.213(e)

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #6 continued

ORDER FOR SUPPLIES OR SERVICES SCHEDULE - CONTINUATION						PAGE NO. 3 of 3
IMPORTANT: Mark all packages and papers with contract and/or order numbers						
DATE OF ORDER 01 OCT 97		CONTRACT NUMBER DTCG31-97--VFN001		ORDER NUMBER 2698317VFN001		
ITEM NO. (A)	SUPPLIES OR SERVICES (B)	QUANTITY ORDERED (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)	QUANTITY ACCEPTED (G)
6.	<p>DELIVERY TICKETS: All shipments under this agreement shall be accompanied by a signed delivery ticket or sales slip which contains the following minimum information:</p> <ul style="list-style-type: none"> a. Name of vendor. b. Blank space for Phase Agreement number. c. Date of sale. d. Description of commodities or services furnished. e. Quantity, unit price and extension of each line item less applicable discounts. f. Date of delivery, pickup or shipment. g. Call identification number. h. Signature of Coast Guard receiving official. 					
7.	<p>INVOICES: The vendor shall accumulate delivery tickets for those deliveries actually made for the billing period. The billing period shall be monthly. The invoice shall include a list of the delivery tickets for which payment is requested, the amount of each and the total due. The invoice shall be accompanied by signed delivery tickets. The original invoice with accompanying delivery tickets, shall be mailed to the address listed on page 1 block 5.</p>					
TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H)) ▶						

OPTIONAL FORM 348(10-83)
Prescribed by GSA
FAR (48CFR) 53.213(e)

Continued on next page

Practice Exercise #7

USCG TRACEN PETALUMA
COAST GUARD DINING FACILITY CALL SHEET

MONTH _____

VENDOR: RITZ FOOD SERVICE

ADDRESS: P. O. BOX 69

SANTA ROSA, CA. 95402

PHONE NO.: (800) 998-9070

POC:

CALLER NAME: FSC J. L. EISEN

CALLER NAME: FSCS D. A. KARBO

CALLER NAME:

SIGNATURE:

SIGNATURE:

SIGNATURE:

[illegible]

SUB TOTAL 489.00

LESS CREDITS

				LESS CREDITS	

ACCT: 2/Q/XS6/174/PT/0/82/61200/2617

GRAND TOTAL 489.00

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #8

REQUEST FOR QUOTATIONS (THIS IS NOT AN ORDER)		THE NOTICE OF SMALL BUSINESS - SMALL PURCHASE SET - APPEARS ON PAGE 3 OF THIS FORM		PAGE OF PAGES	
1. REQUEST NO.		2. DATE ISSUED		3. REQUISITION/PURCHASE REQUEST NO.	
		15 June 1995		DTCG32-95JYE020	
4A. ISSUED BY CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320				4. CERT. FOR NAT. DEF. UNDER DMSA REG. 3 AND/OR DMS REG. 1	
				5. DELIVER BY (Date) 15 August 1995	
5B. FOR INFORMATION CALL: (Phone and telephone no.) (No collect calls) FS2 Your Name (332) 525-2738				7. DELIVERY BY	
6. NAME AND ADDRESS INCLUDING ZIP CODE Ape Appliance 313 N. Main Baltimore, MD. 04035				8. DESTINATION (Check appropriate box) <input type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER (SEE SCHEDULE)	
				9. DESTINATION (Country and address including ZIP code) CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320	
10. PLEASE FURNISH QUOTATIONS TO THE ISSUING OFFICE ON OR BEFORE CLOSE OF BUSINESS (Date) 7/15/95		11. BUSINESS CLASSIFICATION (Check appropriate boxes) <input type="checkbox"/> SMALL <input type="checkbox"/> OTHER THAN SMALL <input type="checkbox"/> DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED			
IMPORTANT: This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contract for supplies or services. Supplies are of domestic origin unless otherwise indicated by quote. Any representations and/or certifications attached to this Request for Quotations must be completed by the quote.					
12. SCHEDULE (Include applicable Federal, state and local taxes)					
ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)
1.	FROSTLINE FREEZER, WALK-IN, MODEL #98SD	1	EA		
13. DISCOUNT FOR PROMPT PAYMENT <input type="checkbox"/> 15 CALENDAR DAYS % <input type="checkbox"/> 30 CALENDAR DAYS % <input type="checkbox"/> 36 CALENDAR DAYS % <input type="checkbox"/> CALENDAR DAYS %					
NOTE: Page 2 must also be completed by the quote.					
14. NAME AND ADDRESS OF QUOTER (Street, city, country, State ZIP Code)			15. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION		16. DATE OF QUOTATION
			17. NAME AND TITLE OF SIGNER (Type or Print)		18. TELEPHONE NO. (Include area code)

NSN 7540-01-132-0004
PREVIOUS EDITION NOT USABLE

STANDARD FORM 18 (Rev. 10-83)
Prescribed by GSA
FAR (48 CFR) 53.215 - 1(p)

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #8 continued

REQUEST FOR QUOTATIONS (THIS IS NOT AN ORDER)		THIS NOTICE OF SMALL BUSINESS - SMALL PURCHASE SET - APPEARS ON PAGE 2 OF THIS FORM <input checked="" type="checkbox"/> IS <input type="checkbox"/> IS NOT APPLICABLE		PAGE OF PAGES 1 1	
1. REQUEST NO.		2. DATE ISSUED 15 June 1995		3. REQUISITION/PURCHASE REQUEST NO. DTCG32-95JAD020	
4A. ISSUED BY CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320		4. CMT. FOR NAT. DISP. UNDER DMSA REG. 2 AND/OR DMS REG. 1		5. DELIVER BY (Date) 15 August 1995	
6A. FOR INFORMATION CALL: (Name and telephone no.) (No collect calls) FS2 Your Name (332) 525-2738		7. DELIVERY BY <input type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER (SEE SCHEDULE)		8. DESTINATION (Consignee and address including ZIP code) CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320	
9. NAME AND ADDRESS INCLUDING ZIP CODE Silva's Appliance 1800 Piner Dr. Alexandria, VA. 22304		10. PLEASE FURNISH QUOTATIONS TO THE ISSUING OFFICE ON OR BEFORE CLOSE OF BUSINESS (Date) 7/15/95			
11. BUSINESS CLASSIFICATION (Check appropriate boxes) <input type="checkbox"/> SMALL <input type="checkbox"/> OTHER THAN SMALL <input type="checkbox"/> DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED					
IMPORTANT: This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it. This request does not commit the Government to pay any costs incurred in the preparation of this quotation or to contract for supplies or services. Supplies are of domestic origin unless otherwise indicated by quote. Any representations and/or certifications attached to this Request for Quotations must be completed by the quote.					
12. SCHEDULE (Include applicable Federal, state and local taxes)					
ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)
1.	FROSTLINE FREEZER, WALK-IN, MODEL #98SD	1	EA		
13. DISCOUNT FOR PROMPT PAYMENT <input type="checkbox"/> 15 CALENDAR DAYS % <input type="checkbox"/> 30 CALENDAR DAYS % <input type="checkbox"/> 30 CALENDAR DAYS % <input type="checkbox"/> CALENDAR DAYS %					
NOTE: Page 2 must also be completed by the quote.					
14. NAME AND ADDRESS OF QUOTE (Street, city, county, State ZIP Code)			15. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION		16. DATE OF QUOTATION
			17. NAME AND TITLE OF SIGNER (Type or Print)		18. TELEPHONE NO. (Include area code)

NSN 7540-01-12-8084
PREVIOUS EDITION NOT USABLE

STANDARD FORM 18 (Rev. 10-83)
Prescribed by GSA
FAR (48 CFR) 53.215 - 1(a)

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #8

REQUEST FOR QUOTATIONS (THIS IS NOT AN ORDER)		THE NOTICE OF SMALL BUSINESS - SMALL PURCHASE SET - APPEARS ON PAGE 2 OF THIS FORM		PAGE 1 OF 1 PAGES	
1. REQUEST NO.		2. DATE ISSUED 15 June 1995		3. REQUISITION/PURCHASE REQUEST NO. DTCG32-95JAD020	
4. ISSUED BY CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320		5. CMT. FOR NAT. DEF. UNDER NSMA REG. 2 AND/OR DMR REG. 1			
6. FOR INFORMATION CALL: (Name and telephone no.) (No collect calls) FS2 Your Name (332) 525-2738		7. DELIVER BY (Date) 15 August 1995			
8. NAME AND ADDRESS INCLUDING ZIP CODE AIKMAN REFRIGERATION CO. 12 Stony Point Road Glen Burnie, MD. 04872		9. DESTINATION (Check one) <input type="checkbox"/> FOR DESTINATION <input type="checkbox"/> OTHER (SEE SCHEDULE) CONTRACTING OFFICER US COAST GUARD ACADEMY NEW LONDON, CT. 06320			
10. PLEASE FURNISH QUOTATIONS TO THE BUILDING OFFICE ON OR BEFORE CLOSE OF BUSINESS (Date) 7/15/95		11. BUSINESS CLASSIFICATION (Check appropriate boxes) <input type="checkbox"/> SMALL <input type="checkbox"/> OTHER THAN SMALL <input type="checkbox"/> DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED			
<p>IMPORTANT: This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contract for supplies or services. Supplies are of domestic origin unless otherwise indicated by quote. Any representations and/or certifications attached to this Request for Quotations must be completed by the quote.</p>					
12. SCHEDULE (Include applicable Federal, state and local taxes)					
ITEM NO. (a)	SUPPLY/REPAIR/MAINTENANCE (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)
1.	FROSTLINE FREEZER, WALK-IN, MODEL #98SD	1	EA		
13. DISCOUNT FOR PROMPT PAYMENT					
		15 CALENDAR DAYS	20 CALENDAR DAYS	30 CALENDAR DAYS	CALENDAR DAYS
		%	%	%	%
NOTE: Page 2 must also be completed by the quote.					
14. NAME AND ADDRESS OF QUOTE (Street, city, county, State ZIP Code)			15. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION		16. DATE OF QUOTATION
			17. NAME AND TITLE OF SIGNER (Type or Print)		18. TELEPHONE NO. (Include area code)

NSN 7540-01-132-8004
PREVIOUS EDITION NOT USABLE

STANDARD FORM 18 (Rev. 10-83)
Prescribed by GSA
FAR (48 CFR) 53.215 - 1(p)

Continued on next page

Chapter 2 Feedback, continued

Practice Exercise, #9

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE		PAGE OF PAGES 1 1	
2. AMENDMENT/MODIFICATION NO. 0001		3. EFFECTIVE DATE 27 SEP 97		4. REQUISITION/PURCHASE REQ. NO. 219728877FP314		5. PROJECT NO. (If applicable)	
6. ISSUED BY CONTRACTING OFFICER USCG Station Fort Pierce Panama City, FL. 86754-0030		7. ADMINISTERED BY (If other than Item 6)		CODE			
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) MARY'S Cake Decorating Supplies 67823 Market Street Fort Pierce, FL. 23773 Phone: (211) 555-5555				(✓)		9A. AMENDMENT OF SOLICITATION NO.	
						9B. DATED (SEE ITEM 11)	
				X		10A. MODIFICATION OF CONTRACT/ORDER NO. DTCG28-97-P-FP314	
						10B. DATED (SEE ITEM 13) 25 SEP 97	
CODE		FACILITY CODE		11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS			
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. ACCOUNTING AND APPROPRIATION DATA (If required)							
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
<input checked="" type="checkbox"/> A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. <div style="text-align: center; border: 1px solid black; padding: 2px;">F.A.R. PART 13</div> <input type="checkbox"/> B. THE ABOVE NUMBER CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). <input type="checkbox"/> C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: <input type="checkbox"/> D. OTHER (Specify type of modification and authority)							
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies of the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)							
1. AMMEND BLOCK 17 LINE 1 TO READ \$290.00 IN LIEU OF \$240.00 - INCREASE OF \$50.00 RECAP: OLD PURCHASE ORDER TOTAL: \$240.00 INCREASE \$50.00 OLD PURCHASE ORDER TOTAL: \$290.00							
Except as provided herein, all terms and conditions of the document referenced in Item 9A and 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or Print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				F. L. Reams SKC, USCG			
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA		16C. DATE SIGNED	
(Signature of Contracting Officer)				(Signature of Contracting Officer)		27 SEP 97	
NSN 7540-01-152-0070 PREVIOUS EDITION UNUSABLE				STANDARD FORM 30 (Rev. 10-83) Prescribed by GSA FAR (48 CFR) 53.243			

Chapter 3 Feedback

Practice Exercise, #1

DOCUMENT IDENTIFICATION													SIGNATURE OF REQUESTER
1. DOC. IDEN.	2. ROUTING IDEN.	3. M. & S.	DOCUMENT NUMBER		4. S. & M.	14. M. & S. B. SUPPLEMENTARY ADDRESS	15. S. & M. B. SUPPLEMENTARY ADDRESS	16. S. & M. B. SUPPLEMENTARY ADDRESS	17. S. & M. B. SUPPLEMENTARY ADDRESS	18. S. & M. B. SUPPLEMENTARY ADDRESS	19. S. & M. B. SUPPLEMENTARY ADDRESS	20. S. & M. B. SUPPLEMENTARY ADDRESS	
1-3	4-6	7	8-10 REQUEST	11. DATE	12	13	14	15	16	17	18	19	
REQUISITION DATA													NOTE: Entries in shaded blocks may be in either the FIXED (F) or VARIABLE (V) sections - NEVER in both.
4. POC	5. M. & S.	6. ADD. TYP.	7. UNIT OF ISSUE	8. QUANTITY	9. SERIAL	10. M. & S. B. SUPPLEMENTARY ADDRESS	11. S. & M. B. SUPPLEMENTARY ADDRESS	12. S. & M. B. SUPPLEMENTARY ADDRESS	13. S. & M. B. SUPPLEMENTARY ADDRESS	14. S. & M. B. SUPPLEMENTARY ADDRESS	15. S. & M. B. SUPPLEMENTARY ADDRESS	16. S. & M. B. SUPPLEMENTARY ADDRESS	
8-11	12-13	14-15	16-17	18-19	20-21	22-23	24-25	26-27	28-29	30-31	32-33	34-35	
7920	00-061-0038		EA	3									
7930	01-075-0776		GL	4									
7920	00-891-7537		BX	1									
7920	01-162-6064		BX	1									
7920	01-222-7798		KT	1									
7530	00-222-3521		EA	4									
7520	01-060-5820		DZ	2									
5110	00-345-5289		EA	1									
MULTIUSE STANDARD REQUISITIONING/ISSUE SYSTEM DOCUMENT												STANDARD FORM 344 FEB 1954 EDITION GENERAL SERVICES ADMINISTRATION FORM 344 (11-58) 101-34.3	

Continued on next page

Chapter 1 Feedback, continued

Practice Exercise, #2

[illegible]

Chapter 5

DAFIS Accounting check off sheet

Directions The student has just practiced performing the tasks necessary to interpret and construct DAFIS accounting lines. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student construct and interpret:

	YES	NO
• DAFIS accounting line I.A.W. FINCEN SOP	_____	_____
• DAFIS standard document number I.A.W. FINCEN SOP	_____	_____
• DAFIS non-standard document number I.A.W. FINCEN SOP	_____	_____
• Acquisition Instrument Identification Number (AIIN) I.A.W. FINCEN SOP	_____	_____

Purchase Order Check Off Sheet

Directions The student has just practiced performing the tasks necessary to execute a small purchase using a Purchase Order (CG-5398, OF-347). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

YES NO

- | | | |
|---|-------|-------|
| • Obtain price quotes | _____ | _____ |
| • Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval | _____ | _____ |
| • Prepare Purchase Order and submit to supervisor for approval | _____ | _____ |

Continued on next page

Imprest Fund Check Off Sheet

Directions The student has just practiced performing the tasks necessary to execute a small purchase using Imprest Funds. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

YES NO

- | | | |
|---|-------|-------|
| • Obtain price quotes | _____ | _____ |
| • Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval | _____ | _____ |
| • Prepare Receipt for Cash Sub voucher (SF-1165) and submit to supervisor for approval | _____ | _____ |

Continued on next page

SF-44 Check-Off Sheet

Directions The student has just practiced performing the tasks necessary to execute a small purchase using Purchase Order-Invoice-Voucher (SF-44). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

	YES	NO
• Obtain price quotes	_____	_____
• Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval	_____	_____
• Prepare Purchase Order-Invoice-Voucher (SF-44) and submit to supervisor for approval	_____	_____

Continued on next page

Blanket Purchase Agreement Check-Off Sheet

Directions The student has just practiced performing the tasks necessary to execute a small purchase using a Blanket Purchase Agreement. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

	YES	NO
• Obtain price quotes	_____	_____
• Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval	_____	_____
• Prepare Purchase Order(CG-5398, OF-347) and submit to supervisor for approval	_____	_____

Continued on next page

Credit Card Check-Off Sheet

Directions The student has just practiced performing the tasks necessary to execute a small purchase using a Government-wide Commercial Credit Card. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

YES

NO

- | | | |
|--|-------|-------|
| • Enter the call number | _____ | _____ |
| • Record the Julian date | _____ | _____ |
| • Execute small purchase | _____ | _____ |
| • Initial the log | _____ | _____ |
| • Record the vendor invoice number | _____ | _____ |
| • Enter the last four numbers from the credit card | _____ | _____ |
| • Record the amount of merchandise ordered | _____ | _____ |

Continued on next page

SF-30 Check-Off Sheet

Directions The student has just practiced performing the tasks necessary to modify an existing purchase order. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?

YES

NO

- Prepare an Amendment of Solicitation/
Modification of Contract (SF-30)

Continued on next page

Multi-line Item Requisition Form (SF 344) Check-Off Sheet

Directions

The student has just practiced performing the tasks necessary to execute a small purchase using a Government wide commercial Credit Card. Provide the student an additional scenario to test their level of proficiency. Use the check off sheet below as a guide, and the manuals as the standard.

<i>Did the Student?</i>	YES	NO
• Enter the FSC number	_____	_____
• Enter the NIIN	_____	_____
• Enter the unit of issue	_____	_____
• Enter the quantity in 5 digits	_____	_____
• Enter the name price and total in the remarks block	_____	_____
• Enter the sheet total below the final Item	_____	_____
• Record the amount of merchandise Ordered	_____	_____

continued on the next page

Multi-line Item Requisition Form (SF 344) Check-Off Sheet continued

Directions

The student has just practiced performing the tasks necessary to execute a small purchase using a SURF Requisition Log, (CG-4940). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard.

Did the student?

YES

NO

- Enter the stock number
- Enter the unit of issue
- Enter the quantity in 5 digits
- Enter the unit price
- Enter the correct fund code
- Enter the obligation amount
- Enter the correct nomenclature

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

continued on the next page

Procurement Check - Off Sheet

Directions

If the answer to any of the questions was NO, explain to the student where the errors were made and direct the student to go back and redo the practices for that particular task. Once you are convinced that the student can perform the objectives in accordance with the appropriate references and standards, sign this sheet and performance qualifications D.5.01., D 5.02, D 5.03.

Date _____

Supervisor: _____

Stop here